



LIVE FREE

2020-2021

**Support Local: Go the Extra Mile &
Winter Advertising Effectiveness**

April 2021

Contents

Content	Slide
Background & Objectives	3
Methodology	4
The Advertising Campaigns	5
Insights	6
In-State Support Local Awareness & Reaction	8
Winter Awareness & Reaction	13
Creative Evaluation	20
Support Local Advertising Impact	24
Winter Advertising Impact	30
Winter Trip Specifics Tracking	37
Appendix: COVID-19 Tracking	39
Appendix: Questionnaire	42

Background & Objectives

- The New Hampshire Division of Travel and Tourism Development (DTTD) annually airs winter advertising in select markets. The 2020-2021 winter advertising ran in New Hampshire, Massachusetts, Rhode Island, Connecticut, and Maine.
- In response to the COVID-19 pandemic, DTTD also ran an in-state Support Local: Go the Extra Mile advertising campaign that encourages residents to help local businesses that are doing whatever that they can to make sure their doors stay open.
- In order to be accountable for these investments, DTTD has retained Strategic Marketing & Research Insights (SMARInsights) to conduct research to measure awareness and impact of the advertising. The research is also designed to uncover insights that guide strategic decision-making.
- The specific objectives of this research are to:
 - Measure awareness of the Support Local: Go the Extra Mile and winter advertising;
 - Evaluate the efficiency of the media buys;
 - Understand the overlap and potential impact of exposure to multiple media;
 - Explore the overall reaction to the campaign elements;
 - Determine the advertising's ability to communicate desired messages;
 - Assess the ability of the Support Local: Go the Extra Mile advertising to influence the intended resident behaviors;
 - Assess the ability of the winter advertising to influence New Hampshire winter travel;
 - Calculate the economic impact and return on investment of the advertising; and
 - Forward insights into future refinement of the marketing.

Methodology

- As with prior advertising effectiveness research conducted for DTTD, an online survey was used so that respondents could view the actual advertising. This approach provides a representative measure of aided ad awareness and allows respondents to provide their reaction to the creative.
- National sample vendors with representative panels are used so that the results can be projected to the population.
- In order to qualify for the survey, New Hampshire respondents had to be travel decision makers ages 18 to 65 who regularly take overnight leisure trips of at least 50 miles from home. The same criteria were used for out-of-state respondents, with the addition of required interest in winter vacations that involve skiing, snowboarding, snowmobiling, snowshoeing, or other outdoor winter activities – as these markets were targeted with only the winter advertising. New Hampshire residents were targeted with the Support Local: Go the Extra Mile advertising and the winter advertising.
- A total of 1,203 surveys were completed between March 18th and 31st, 2021.
- Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population distribution.
- The following report summarizes the research results. The questionnaire and the ads tested appear in the Appendix.

Market	Target Audience	Completed Surveys
New Hampshire	General and winter leisure travelers	302
Massachusetts	Winter leisure travelers	351
Rhode Island		150
Connecticut		200
Maine		200
Total		1,203

The Advertising Campaigns

- The Support Local: Go the Extra Mile campaign includes TV, out-of-home, and digital (banners and social media) advertising. DTTD invested \$298,433 on this in-state advertising.
- The winter 2020-2021 campaign includes TV, print, out-of-home, and digital (banners, pre-roll, and social media) advertising. DTTD invested \$356,808 on this winter advertising, down from \$418,175 in winter 2019-2020. Print was added back to the media mix, and the out-of-home investment was reduced notably.
- Examples of the ads are shown to the right. The full collection of assets tested is in the questionnaire in the Appendix.

Medium	2020-2021 Support Local: Go the Extra Mile
TV	\$107,929
OOH	\$27,215
Digital (Banner, Social)	\$163,289
Total	\$298,433



Sample Support Local: Go the Extra Mile ads

Medium	2018-2019 Winter	2019-2020 Winter	2020-2021 Winter
TV	\$96,420	\$88,395	\$80,000
Print	\$5,000	\$0	\$31,475
OOH	\$116,205	\$109,816	\$38,640
Digital (Banner, Pre-Roll, Social)	\$227,000	\$219,964	\$206,693
Total	\$444,625	\$418,175	\$356,808



Sample Winter ads

Insights – Support Local: Go the Extra Mile Advertising

- The Support Local: Go the Extra Mile advertising generated 68% awareness, reaching about 256,000 New Hampshire households.
- Most of those aware of the Support Local: Go the Extra Mile advertising recall seeing ads in multiple media.
- Most New Hampshire residents have a positive reaction to the Support Local: Go the Extra Mile advertising. The 30-second TV ad gets the greatest percentage (80%) of positive reactions.
- The Support Local: Go the Extra Mile advertising influenced New Hampshire residents to support local businesses. Those aware of the advertising were more likely than those not aware of the ads to participate in all featured activities such as ordering takeout from a local restaurant, shopping at local stores, supporting small business, etc.
- The Support Local: Go the Extra Mile advertising influenced about \$34 million in local spending.
- With a media investment of \$298,433, the Support Local: Go the Extra Mile advertising returned \$114 in local spending for each \$1 invested.
- Achieving media overlap is what drove the positive advertising influence.

Insights – Winter Advertising

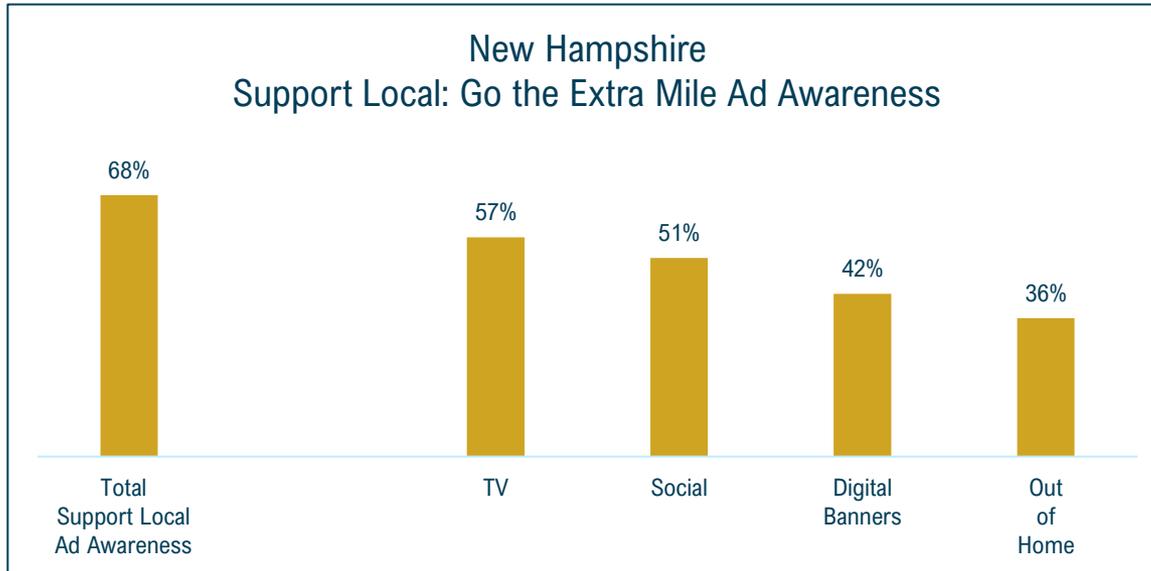
- The 2020-2021 winter advertising generated 64% awareness, reaching about 1.2 million target households.
- The level of ad awareness is notably higher than awareness of the prior two winter advertising campaigns (39% and 52%, respectively). However, the 2020-2021 campaign was more targeted and reached fewer households.
- Winter advertising awareness ranged from a high of 72% in Rhode Island to a low of 63% in Connecticut. While Rhode Island has the highest awareness percentage, it is also the smallest market and produced the fewest ad-aware households of any target market.
- About 80% of consumers who are aware of the winter 2020-2021 ads recall seeing ads in multiple media.
- At least three-quarters of target consumers have a positive reaction to the winter advertising media. The 30-second TV ad stands out for getting 84% positive reactions.
- Compared to industry benchmarks, the winter 2020-2021 advertising excels at communicating the intended messages and in generating interest in New Hampshire travel. The ratings are generally stronger than those of the 2019-2020 winter advertising.
- The 2020-2021 winter advertising influenced about 19,000 New Hampshire trips from January through March 2021.
- These ad-influenced trips resulted in \$18.4 million in visitor spending and returned \$52 for each \$1 invested.
- Like the Support Local: Go the Extra Mile advertising, exposing consumers to ads in multiple media is what drove the ad-influenced winter travel.
- The 2020-2021 winter advertising not only influenced New Hampshire travel, but it also led to more active, better trips and more social media advocacy. The advertising also had a positive impact on the New Hampshire brand.



In-State Support Local: Go the Extra Mile Advertising Awareness & Reaction

We begin with a review of awareness of and reaction to the Support Local: Go the Extra Mile advertising among New Hampshire residents.

Support Local: Go the Extra Mile Ad Awareness

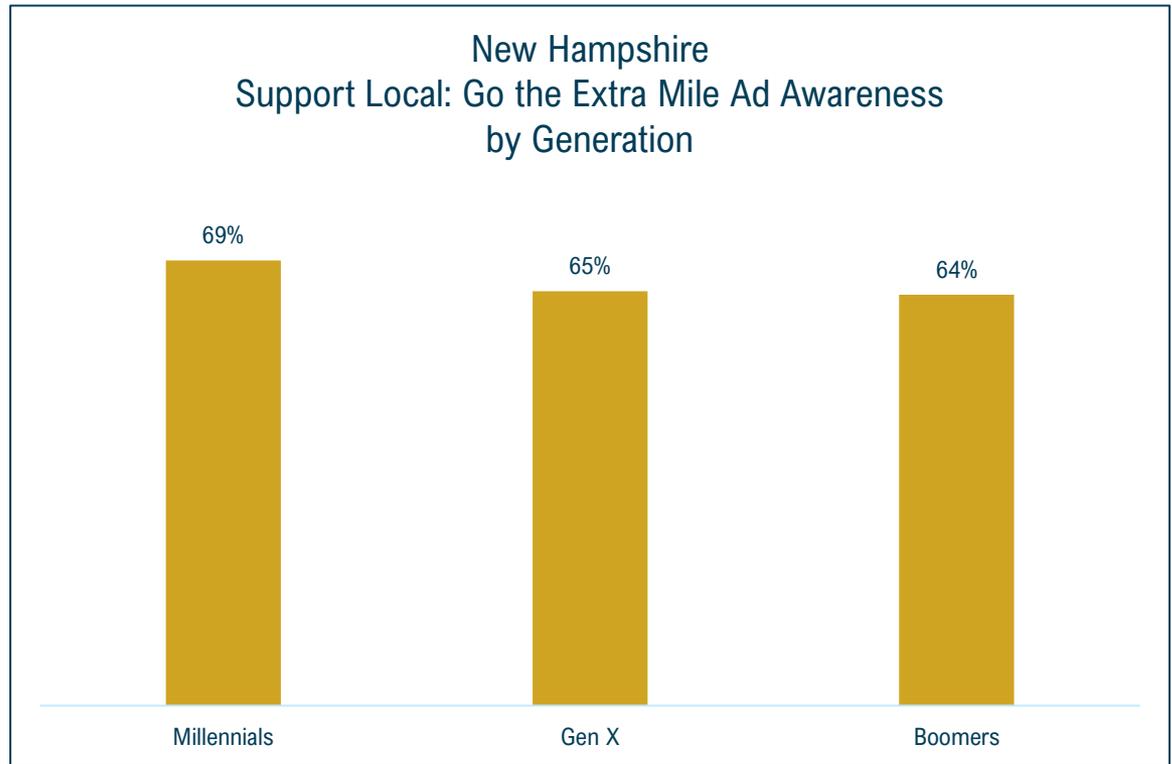


Targeted HHs	379,403
Ad Awareness	68%
Ad-Aware HHs	256,286

- The Support Local: Go the Extra Mile advertising reached just over two-thirds (68%) of New Hampshire households.
- This level of awareness translates into about 256,000 ad-aware New Hampshire households.
- The TV advertising generated the highest awareness of the individual campaign media, followed by social, digital banners, and out-of-home.

Support Local: Go the Extra Mile Ad Awareness by Generation

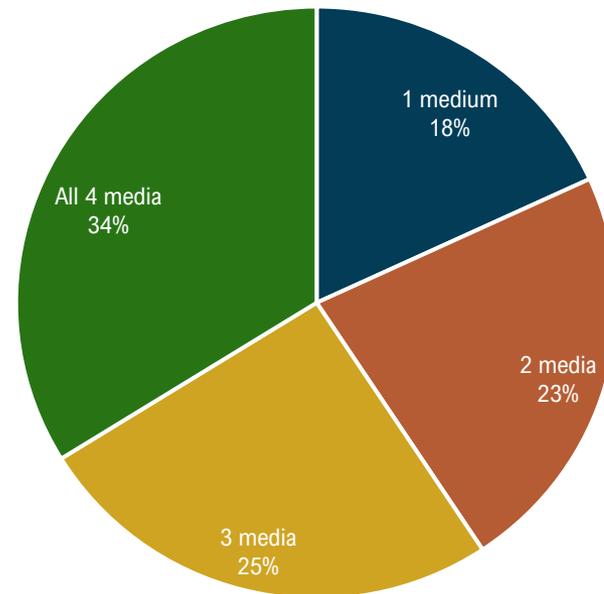
- Awareness of the Support Local: Go the Extra Mile advertising is similar across generational groups.
- Awareness is higher among Millennials, but the difference is not as dramatic as other recent New Hampshire advertising campaigns that generated significantly higher awareness among Millennials.
- It is, of course, a positive result that the message of supporting local businesses is effectively reaching all age groups.



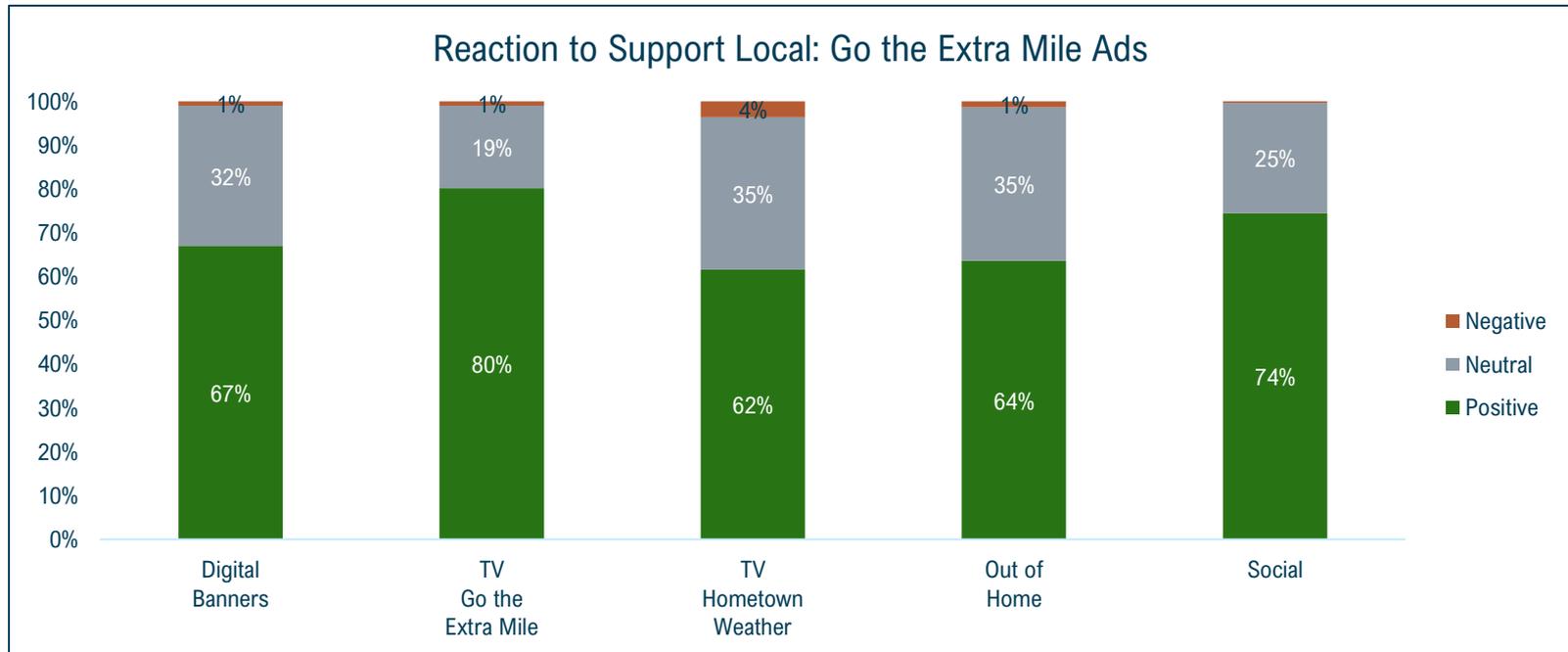
Support Local: Go the Extra Mile Media Overlap

Number of Support Local: Go the Extra Mile Media Recalled (among those aware of any ad)

- Most of those aware of the Support Local: Go the Extra Mile advertising recall seeing ads in multiple media.
- The impact of this overlap is reviewed later, but generally exposure to ads in multiple media leads to greater advertising influence.



Reaction to Support Local: Go the Extra Mile Ads



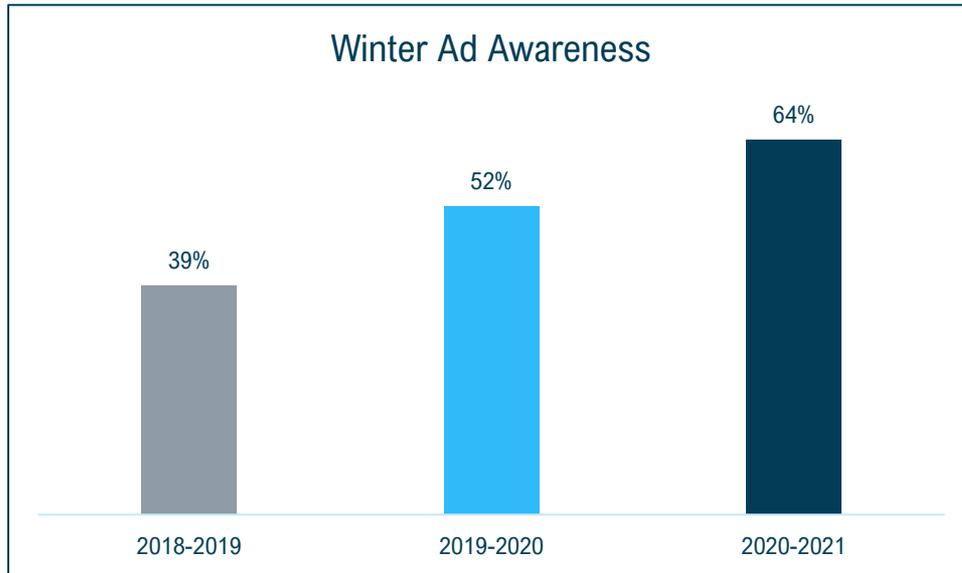
- Most New Hampshire residents have a positive reaction to the Support Local: Go the Extra Mile advertising.
- The 30-second TV ad gets the greatest percentage of positive reactions.



Winter Advertising Awareness & Reaction

This section reviews awareness of and reaction to the 2020-2021 winter advertising in all target markets.

Winter Ad Awareness

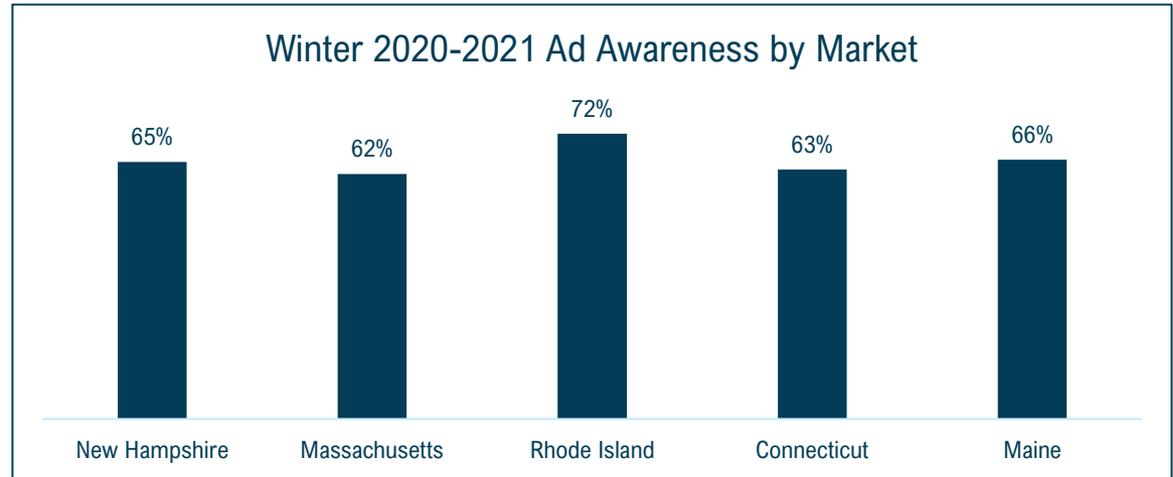


	2018-2019	2019-2020	2020-2021
Targeted HHs	13,596,329	6,433,066	1,927,786
Ad Awareness	39%	52%	64%
Ad-Aware HHs	5,290,859	3,370,926	1,228,398
Media Spending	\$484,625	\$418,175	\$356,808
Cost per Aware HH	\$0.09	\$0.12	\$0.29

- The 2020-2021 winter advertising reached 64% of target households, or about 1.2 million households.
- The level of 2020-2021 winter advertising awareness is notably higher than awareness of the prior two winter advertising campaigns. However, the 2020-2021 campaign was more highly targeted and reached fewer households. The result is a less efficient media buy in terms of cost per aware household compared to the prior two winter campaigns, but \$0.29 is on par with other campaigns of similar scope. In other words, the 2020-2021 media buy is expectedly efficient, while the prior two media buys had better-than-average efficiency.

Winter Ad Awareness by Market

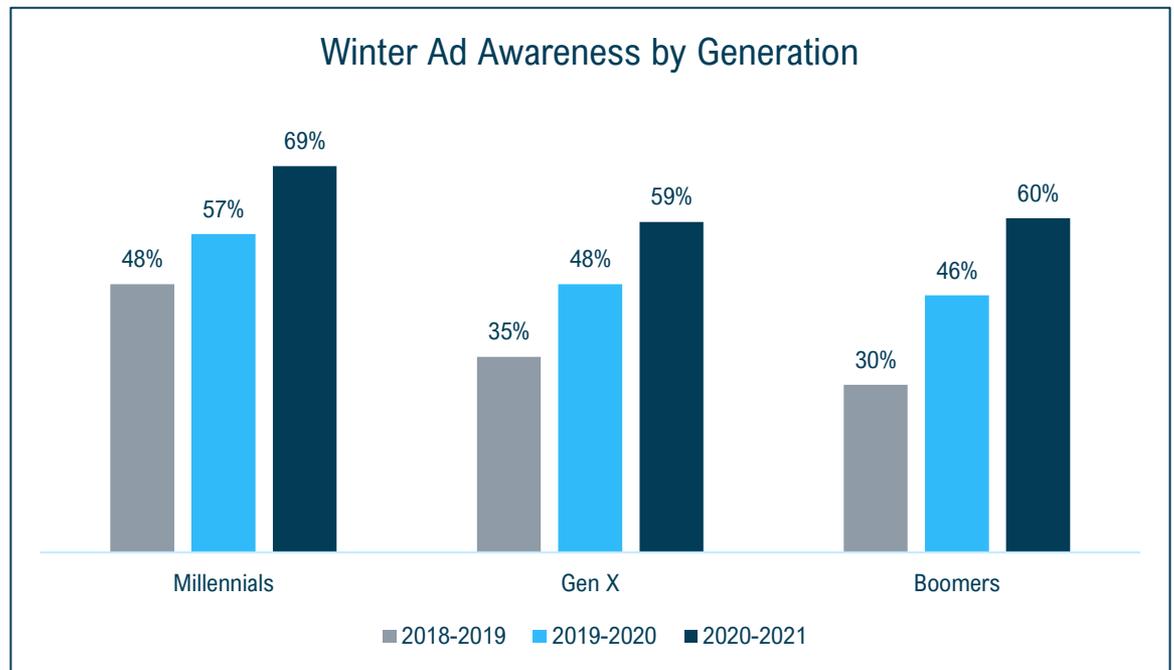
- Winter advertising awareness ranged from a high of 72% in Rhode Island to a low of 62% in Massachusetts.
- While Rhode Island has the highest awareness percentage, it is also the smallest market and produced the fewest ad-aware households.
- Generally, reaching more than 60% of target households across markets is a positive result.



	New Hampshire	Massachusetts	Rhode Island	Connecticut	Maine
Targeted HHs	379,403	831,372	134,619	408,459	173,933
Ad Awareness	65%	62%	72%	63%	66%
Ad-Aware HHs	246,235	513,982	96,926	257,329	113,926
Media Spending	\$57,339	\$82,039	\$60,939	\$67,679	\$57,339
Cost per Aware HH	\$0.23	\$0.16	\$0.63	\$0.26	\$0.50

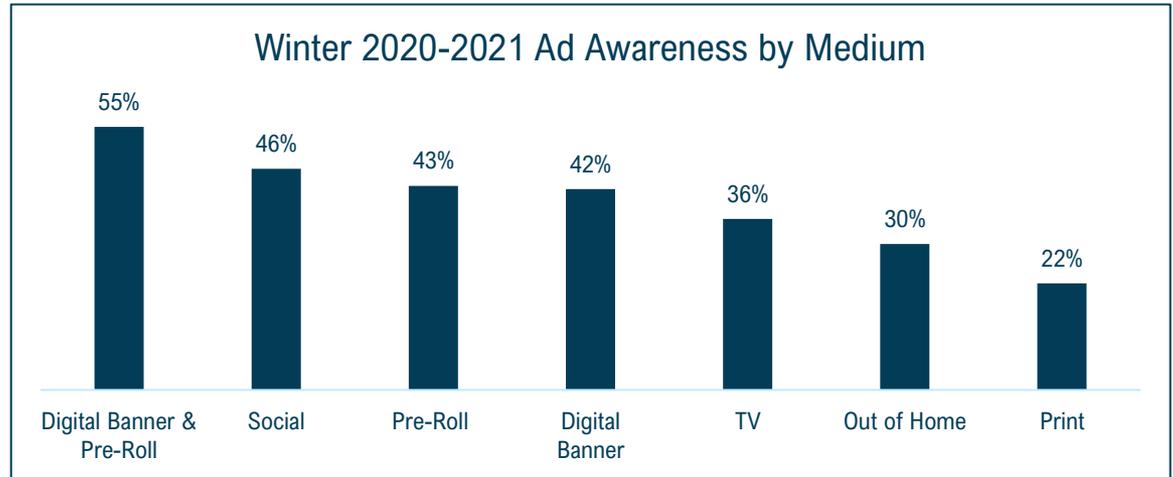
Winter Ad Awareness by Generation

- Awareness of the winter 2020-2021 advertising is highest among the Millennial generation, as it was for the prior two winter campaigns.
- The difference in awareness by generation here is more pronounced than it is for the in-state Support Local: Go the Extra Mile campaign.



Winter Ad Awareness by Medium

- Of the individual winter media, the social ads generated the highest awareness (46%).
- The digital pre-roll and banner ads generated the next highest awareness (43% and 42%, respectively). We also show aggregate awareness of these two media (55%), as the digital media investment (\$130,000) includes both types of ads.
- The cost per aware household is similar across media – and all media are reaching target households efficiently.

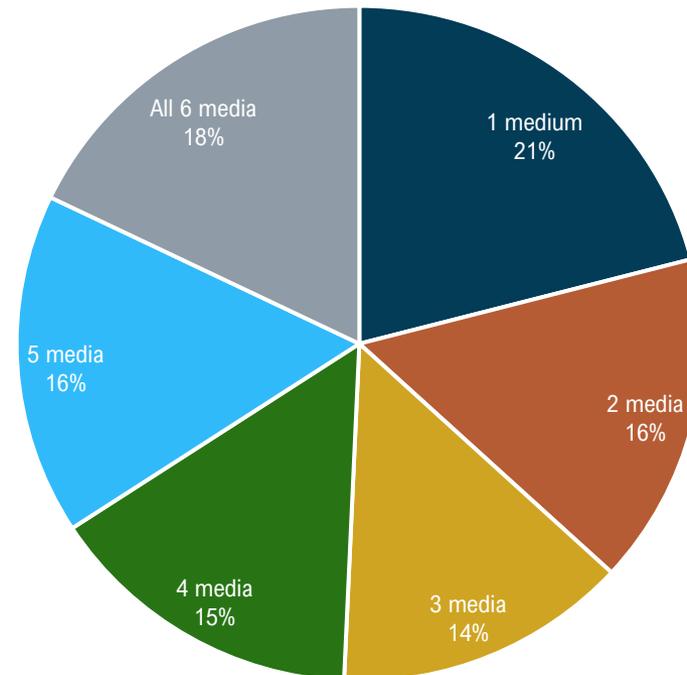


	Digital Banner & Pre-Roll	Social	TV	Out of Home	Print
Ad Awareness	55%	46%	36%	30%	22%
Ad-Aware HHs	1,056,791	888,737	687,847	586,623	429,156
Media Spending	\$130,000	\$76,693	\$80,000	\$38,640	\$31,475
Cost per Aware HH	\$0.12	\$0.09	\$0.12	\$0.07	\$0.07

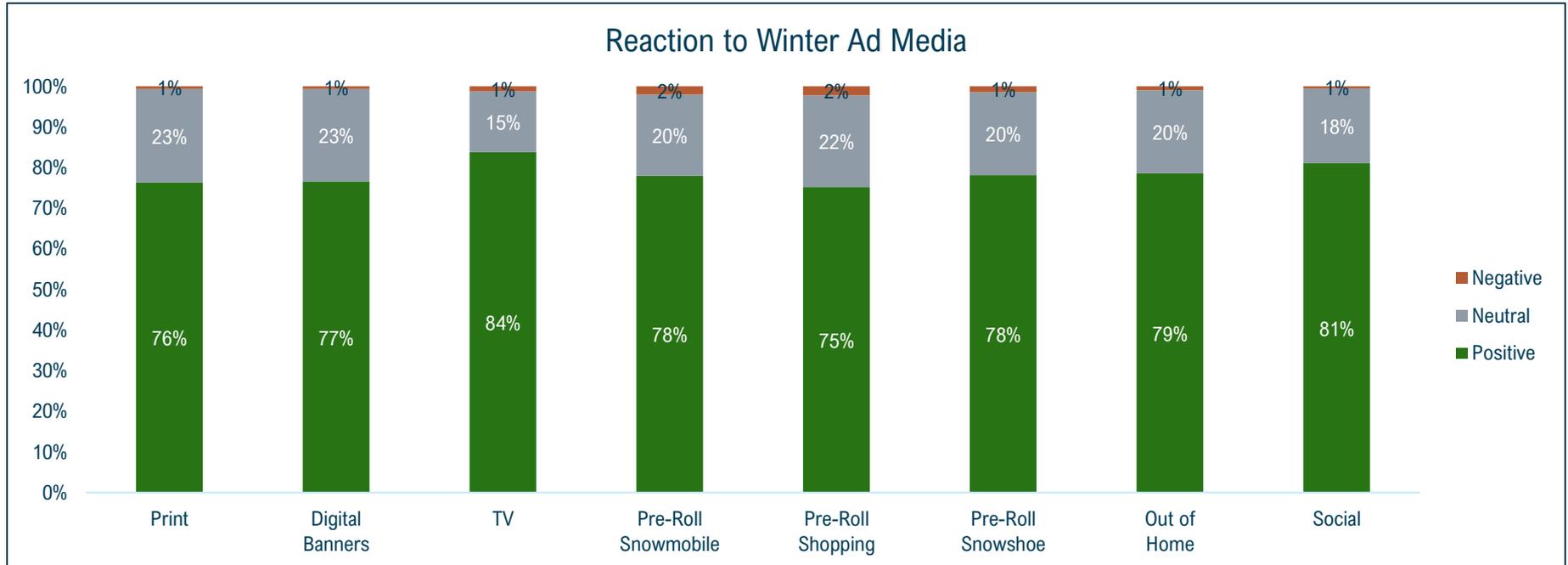
Winter Media Overlap

Number of Winter Media Recalled
(among those aware of any ad)

- As noted, there are six winter ad media (TV, pre-roll, banners, print, OOH, and social).
- About 80% of consumers who are aware of the ads recall seeing ads in multiple media. Again, exposing consumers to ads across media is critical for generating impact, so this level of overlap foreshadows an impactful winter campaign.



Reaction to Winter Ads



- Like the in-state Support Local: Go the Extra Mile results, the winter TV advertising receives the greatest percentage of positive responses.
- Across media/ads, at least three-quarters of target consumers have a positive reaction.



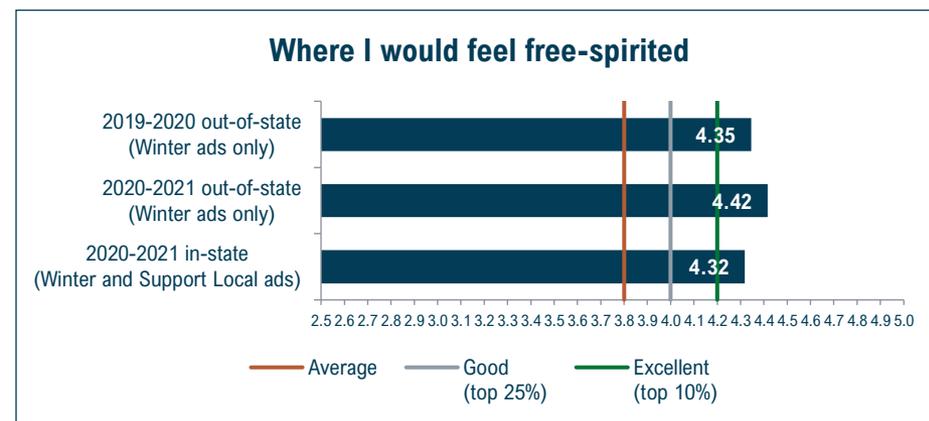
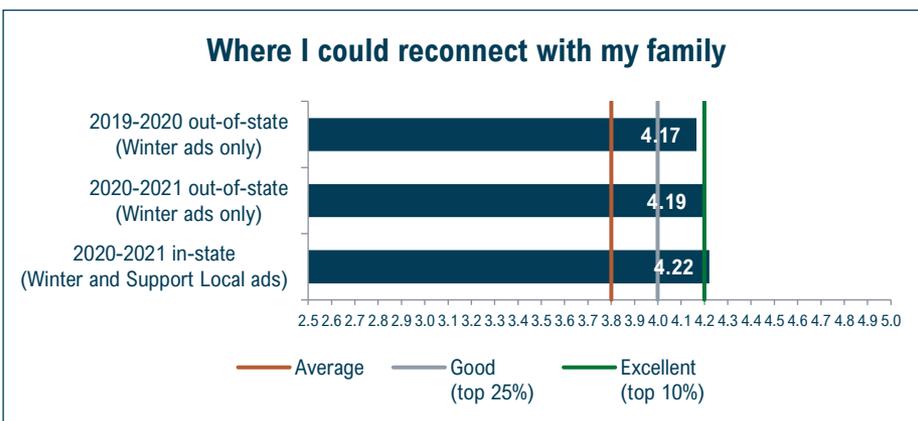
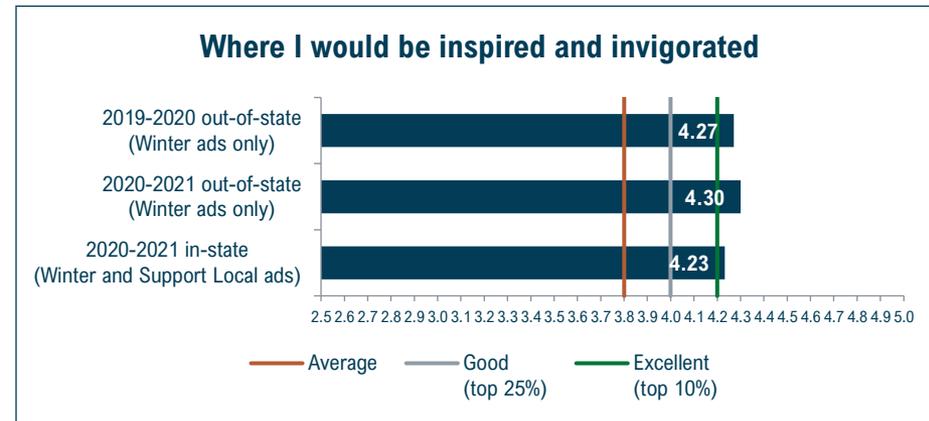
Creative Evaluation

The creative ratings reviewed in this section refer to all advertising tested. This means the winter ads for the out-of-state markets and the winter ads and Support Local: Go the Extra Mile ads for the in-state market (respondents evaluated the creative after viewing all ads that ran in their market). Past results are included for comparison. Three groups are shown on each of the following charts:

1. 2019-2020 out-of-state (winter ads only)
2. 2020-2021 out-of-state (winter ads only)
3. 2020-2021 in-state (winter and Support Local: Go the Extra Mile ads)

Creative Communication Ratings

- Out-of-state consumers give the 2020-2021 winter advertising higher ratings than they gave the 2019-2020 winter advertising.
- Generally, the winter creative has been and remains excellent (top 10%) compared to SMARInsights' industry benchmarks for communicating *invigorated*, *family connection*, and *free-spirited*.



Creative Communication Ratings Cont.

Where I could uncover new places or things



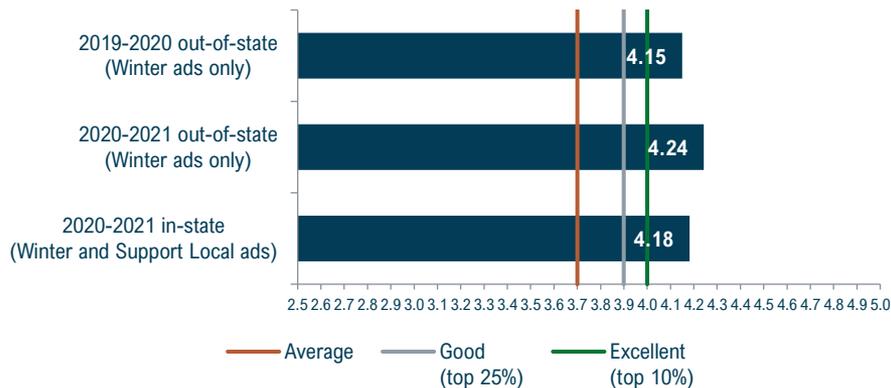
Where I would be challenged to live life to the fullest



- The winter advertising continues to excel among the out-of-state consumers in its communication of *uncovering new places or things*. And the combination of winter/Support Local: Go the Extra Mile advertising does the same for the in-state consumers.
- The advertising is good (top 25%) at communicating *challenged to live life to the fullest*.

Creative Impact Ratings

Want to learn more about things to see and do in the state



Want to visit the state



- The advertising excels in terms of its evaluative ability to generate interest in New Hampshire travel.
- Advertising impact on consumer behaviors is reviewed next.



New Hampshire

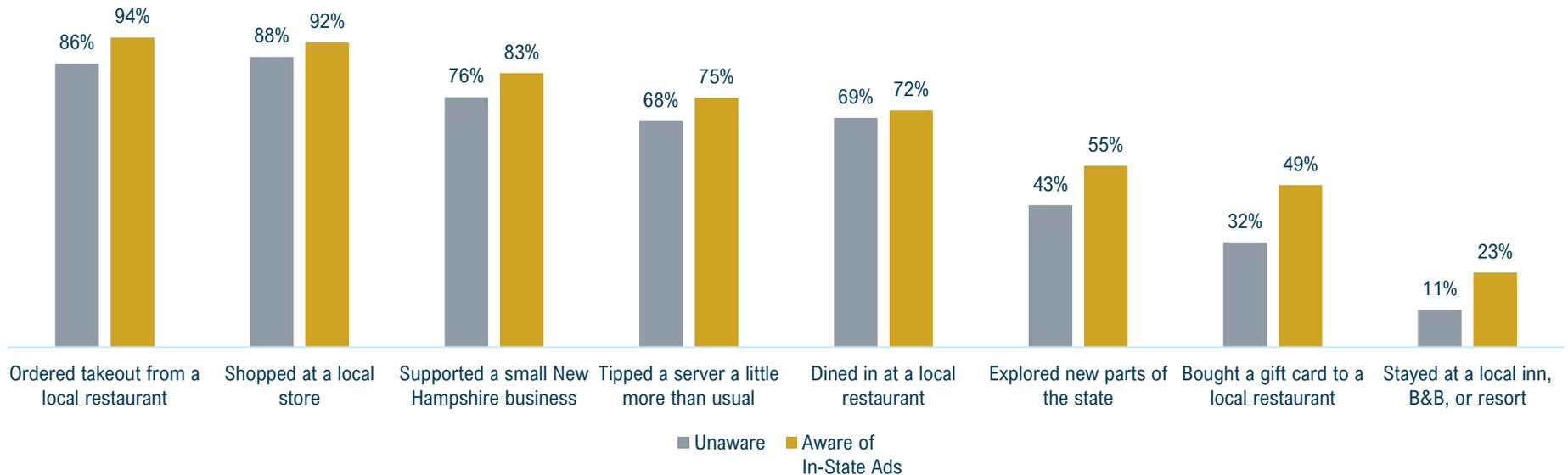
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Support Local: Go the Extra Mile Advertising Impact

Typically, we use the measure of incremental travel to evaluate advertising impact. However, the Support Local: Go the Extra Mile campaign was intended to influence residents to New Hampshire businesses by participating in activities like ordering takeout from a local restaurant, shopping at local stores, supporting small business, etc. Thus, the impact of the Support Local: Go the Extra Mile campaign is evaluated by determining incremental participation in these activities and applying average rates of spending on each.

Ad-Influenced Local Support Activities

Which of the following have you done in New Hampshire in 2021?



- The New Hampshire residents aware of the Support Local: Go the Extra Mile advertising were more likely than those not aware of the ads to participate in all activities. In other words, the advertising influenced residents to support local businesses.

Ad-Influenced Local Spending

	Ordered takeout from a local restaurant	Shopped at a local store	Supported a small New Hampshire business	Tipped a server a little more than usual	Dined in at a local restaurant	Explored new parts of the state	Bought a gift card to a local restaurant	Stayed at a local inn, B&B, or resort
HHS Aware of Support Local: Go the Extra Mile Campaign	256,286	256,286	256,286	256,286	256,286	256,286	256,286	256,286
Incremental Participation	8%	4%	7%	7%	2%	12%	17%	11%
Incremental Participating HHS	20,280	11,281	18,793	18,255	5,589	30,869	44,560	29,023
Average Spending Among Ad-Aware	\$223	\$227	\$172	\$70	\$200	\$222	\$99	\$350
Ad-Influenced Spending	\$4,526,412	\$2,556,876	\$3,230,105	\$1,282,731	\$1,115,137	\$6,858,788	\$4,420,018	\$10,144,850

Total ad-influenced spending = \$34,134,917

- Applying the rate of incremental participation in these local support activities and average resident spending (among ad-aware consumers) on each reveals that the Support Local: Go the Extra Mile advertising influenced about \$34 million in local spending.

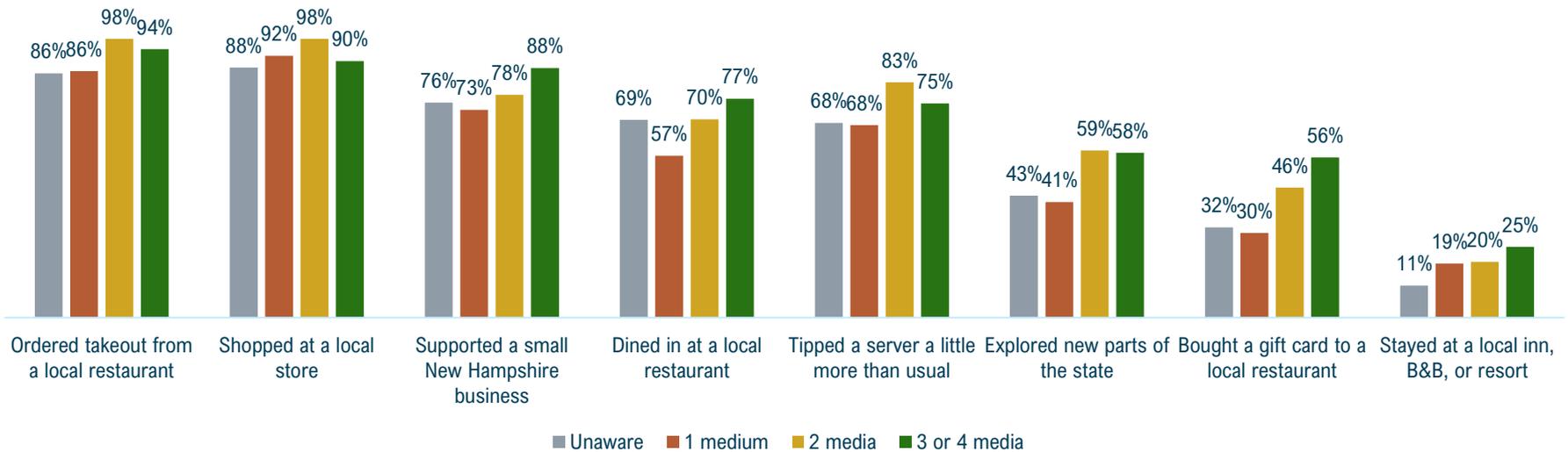
Support Local: Go the Extra Mile ROI

- With a media investment of \$298,433, the Support Local: Go the Extra Mile advertising returned \$114 in local spending for each \$1 invested.

Local Support Activity	Ad-Influenced Spending
Ordered takeout from a local restaurant	\$4,526,412
Shopped at a local store	\$2,556,876
Supported a small New Hampshire business	\$3,230,105
Tipped a server a little more than usual	\$1,282,731
Dined in at a local restaurant	\$1,115,137
Explored new parts of the state	\$6,858,788
Bought a gift card to a local restaurant	\$4,420,018
Stayed at a local inn, B&B, or resort	\$10,144,850
Total	\$34,134,917
Media Investment	\$298,433
ROI	\$114

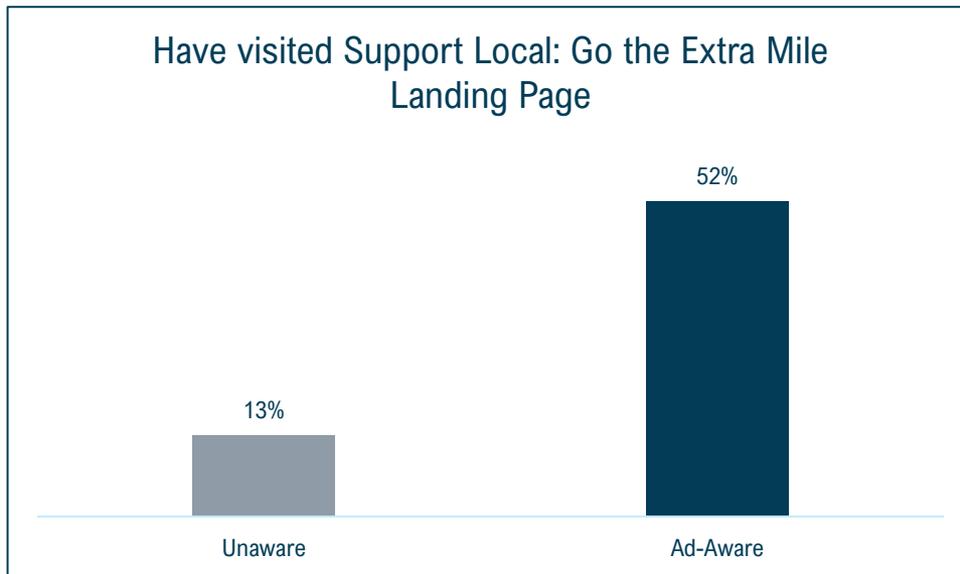
Support Local: Go the Extra Mile Media Overlap Impact

Which of the following have you done in New Hampshire in 2021?



- The reader will recall that those aware of the Support Local: Go the Extra Mile advertising were likely to recall seeing ads in multiple media. This overlap is what drove the positive influence. In fact, there is little to no ad impact among those who recall seeing only one advertising medium.

Support Local: Go the Extra Mile Ad Impact on Landing Page Visits



- In addition to influencing the intended local support activities, the Support Local: Go the Extra Mile advertising also drove residents to visit the associated landing page. About half of those aware of the ads indicate visiting the site, compared to just 13% of those not aware of the ads.





New Hampshire

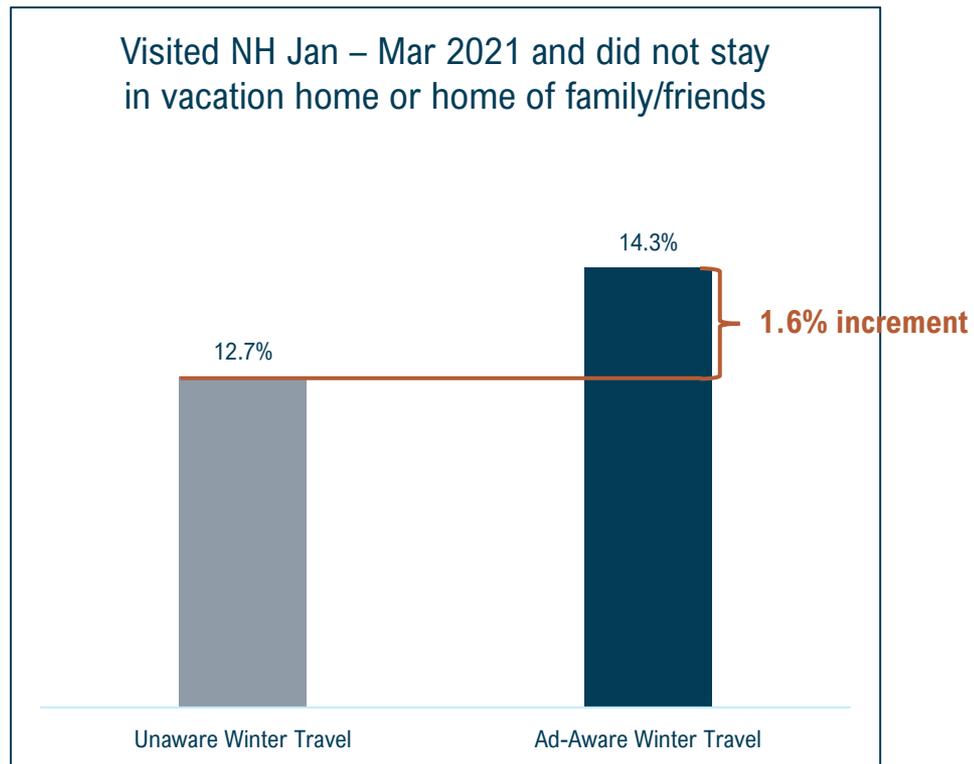
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Winter Advertising Impact

- SMARInsights' traditional methodology for measuring the impact of destination advertising relies on establishing a base rate of travel. Certainly, there would be travel to New Hampshire even without any paid advertising. Thus, not all visitation, or even visitation by ad-aware households, is attributable to the ads. In this evaluation, the level of travel among *unaware* households is considered the base and what the state would see without the marketing campaign. Any travel above that base by *aware* households is what is considered influenced. As such, this is a conservative measure of influence.
- Moreover, for this winter review we are counting only travel that occurred between January and March of 2021 that did not include a stay at the visitor's vacation home or the home of family/friends.

Ad-Influenced Winter Travel

- The 2020-2021 winter advertising influenced New Hampshire travel during the January through March 2021 period.
- The travel increment (level of ad-influenced travel) is 1.6%, which is next used to estimate the quantity of ad-influenced trips, spending, and ROI.



Winter Advertising ROI

- The 2020-2021 winter advertising ultimately influenced \$18.4 million in visitor spending and returned \$52 for each \$1 invested.
- This is a positive result given that the ads are operating during the COVID-19 pandemic. While consumer attitudes about leisure travel are improving (see COVID-19 Perceptions Tracking in the Appendix), the pandemic is certainly still suppressing travel. The 2019-2020 advertising had much stronger results, but any comparison should be made with caution given that the prior ads ran pre-pandemic and targeted a broader geographic swath. The 2019-2020 winter advertising influenced \$259 million in visitor spending and returned \$620 for each \$1 invested – one of the strongest ROIs that SMARInsights has ever measured.

Ad-Influenced Trips	19,286
Average Trip Spending	\$955
Ad-Influenced Spending	\$18,419,365
Media Investment	\$356,808
ROI	\$52

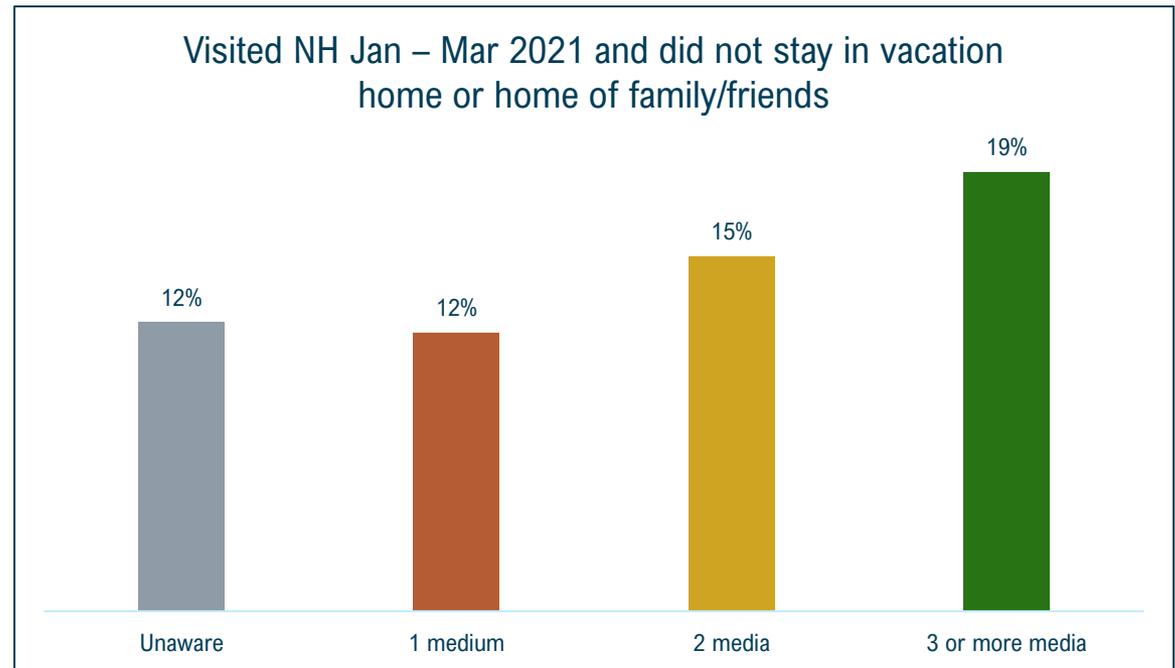
Winter Advertising Tax ROI

- Of the ad-influenced visitor spending, only a portion is subject to tax. New Hampshire has no sales tax on goods and services, so only those expenses related to lodging, meals and transportation are taxed.
- Based on the average visitor spending on the taxable categories of lodging, meals and transportation, the 2020-2021 winter advertising generated about \$1.2 million in taxes.
- Given media spending, the ads returned \$3.44 in tax revenue each \$1 invested.

Ad-Influenced Trips	19,286
Avg. Taxable Trip Spending	\$707
Ad-Influenced Taxable Spending	\$13,629,500
Taxes Generated (9% tax rate)	\$1,226,655
Media Investment	\$356,808
Tax ROI	\$3.44

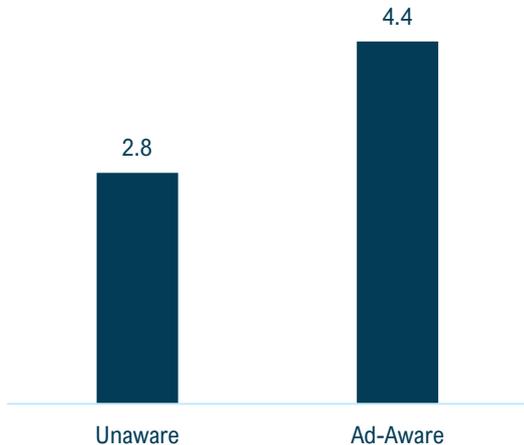
Winter Media Overlap Impact

- Like the Support Local: Go the Extra Mile advertising, the winter advertising influence comes from exposing consumers to ads in multiple media.
- The various campaign elements have different roles at different phases of the decision-making funnel and reaching consumers at these different phases is critical for generating impact. DTTD should continue to implement multi-media campaigns and design media plans that will maximize this overlap.

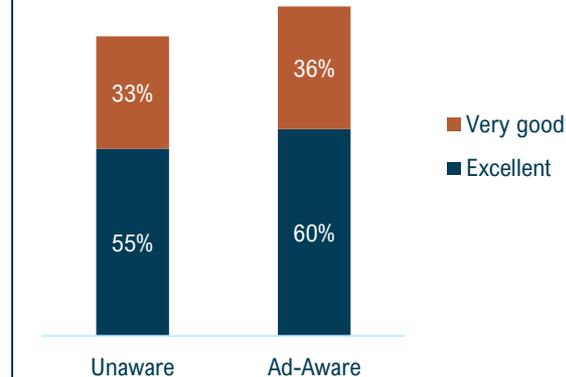


Winter Advertising Impact on the NH Trip

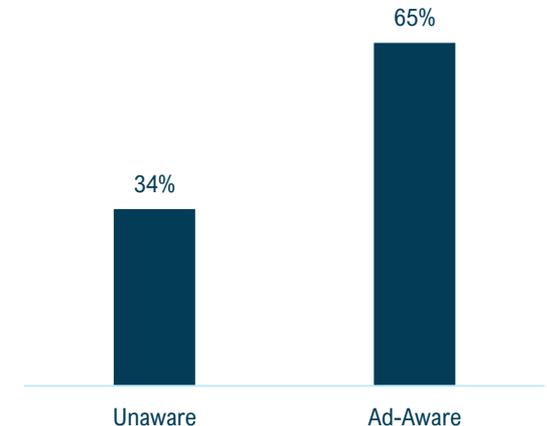
Avg. number of trip activities



NH winter trip rating



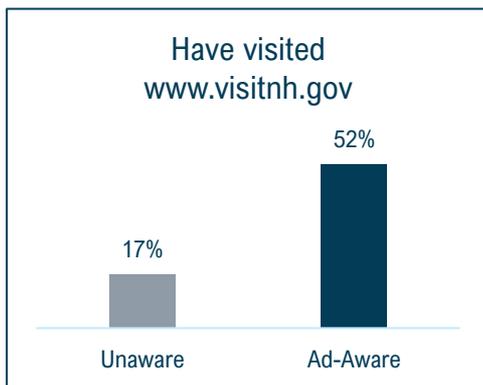
Shared NH winter trip on social media



- The 2020-2021 winter advertising not only influenced New Hampshire travel, but it also gave visitors ideas of things to do by showcasing some of the best of the state's offerings, which led to more active, better trips and more social media advocacy.

Winter Advertising Impact on the NH Brand

- Finally, the winter advertising also helps to build the New Hampshire brand as evidenced in the higher ratings among those aware of the advertising.
- While some of these attributes are not specifically featured in the winter ads, the advertising does influence information gathering (e.g., website visits), which helps to explain the universal perception lift.



New Hampshire...	Unaware	Ad-Aware	Difference
Is a place I would be excited to visit for a leisure trip	4.08	4.32	0.24
Is a kid-friendly vacation destination	4.19	4.40	0.21
Always has something new to discover	3.98	4.18	0.20
Is a good place for shopping	3.84	4.04	0.20
Is a fun and exciting place	3.98	4.18	0.20
Has interesting historical sites and museums	3.73	3.90	0.17
Is a good place for fairs and festivals	3.89	4.06	0.17
Is beautiful	4.51	4.68	0.17
Offers great vacations for people like me	4.18	4.34	0.16
Is a great place to vacation when traveling with children	4.16	4.31	0.15
Is rich in culture and the arts	3.48	3.63	0.15
Is unique because of the variety of destinations and activities it offers vacationers	4.04	4.18	0.14
Is affordable	4.13	4.25	0.13
Offers an attractive lifestyle	4.03	4.15	0.13
Is a good place for culinary activities, including U-pick farms and beer/wine trails	3.84	3.95	0.11
Is a great place for winter sports such as skiing and snowmobiling	4.49	4.58	0.09
Has great parks	4.17	4.26	0.09
Is a good place to live and work	3.93	4.00	0.08
Is safe	4.43	4.50	0.07
Offers lots of outdoor recreation	4.56	4.61	0.05
Is easy to get to	4.50	4.51	0.01



Winter Trip Specifics Tracking

The following table tracks winter trip specifics including trip length, travel party, trip spending, and visitor demographics.

Winter Trip Specifics Tracking

- In 2020-2021 we see shorter trips, smaller parties, and lower spending – likely driven by the pandemic.

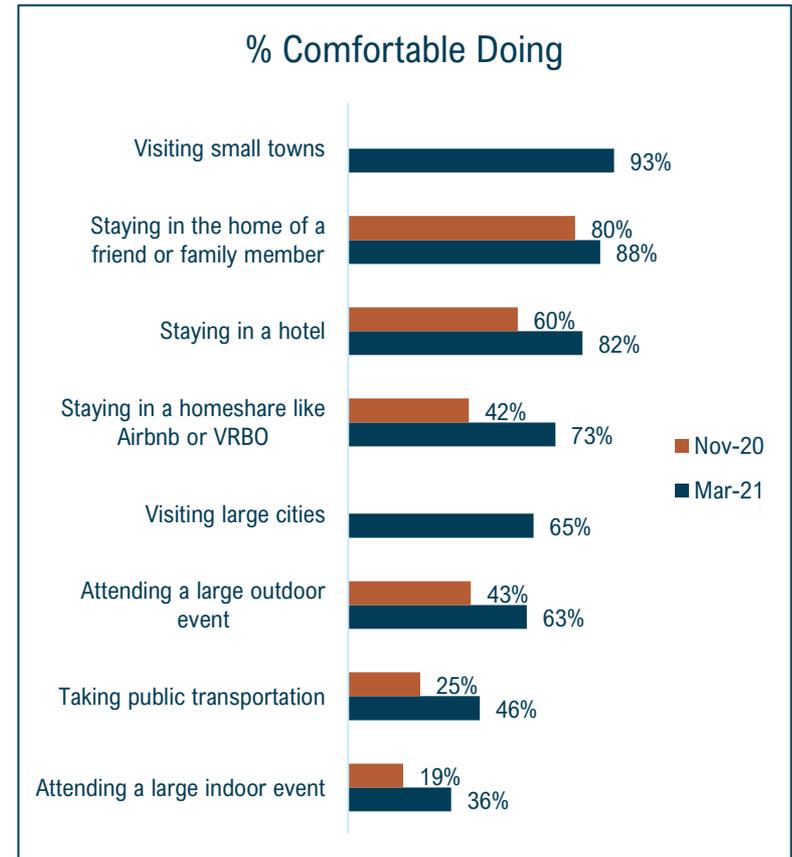
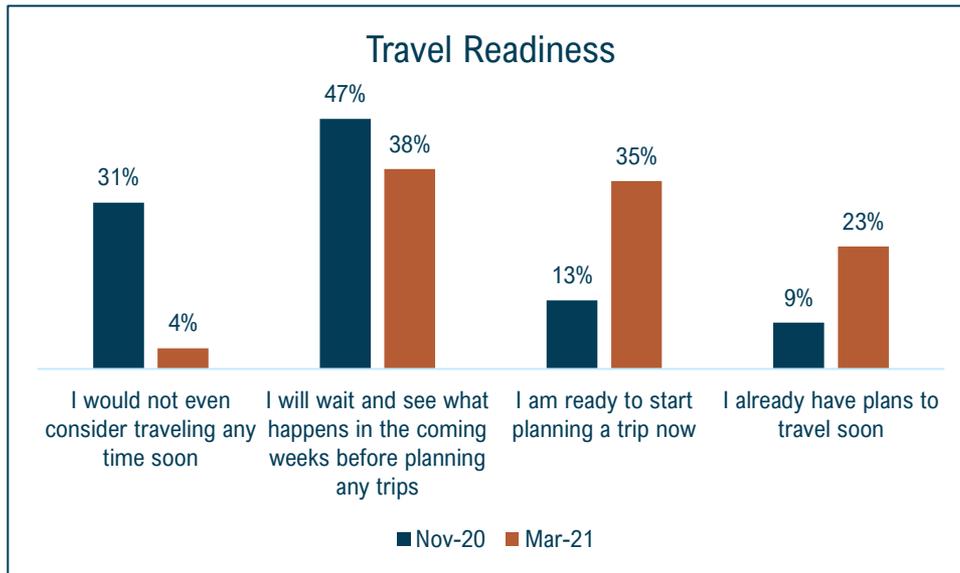
Trip Specifics	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
Nights in New Hampshire	2.8	3.2	2.7	2.7	3.1	2.9
People in your travel party	3.0	3.2	3.0	3.0	3.2	2.9
Kids on trip	45%	38%	33%	27%	44%	35%
Staying with friends and family	19%	22%	21%	20%	22%	26%
Average spending	\$1,140	\$1,000	\$1,039	\$939	\$1,154	\$880
Per person/per day spending	\$138	\$100	\$131	\$116	\$116	\$107
Income						
Less than \$50,000	17%	22%	24%	20%	19%	21%
\$50,000 but less than \$75,000	19%	9%	20%	14%	22%	20%
\$75,000 but less than \$100,000	24%	16%	20%	24%	21%	17%
\$100,000 but less than \$150,000	28%	24%	17%	26%	17%	22%
\$150,000 and up	12%	31%	19%	17%	21%	20%
Generation						
Millennials	49%	23%	34%	40%	39%	38%
Gen Xers	30%	55%	42%	39%	32%	35%
Boomers	21%	22%	24%	22%	22%	17%



Appendix: COVID-19 Perceptions Tracking

The following includes results from the current study and from the fall 2020 study, which was conducted in November 2020.

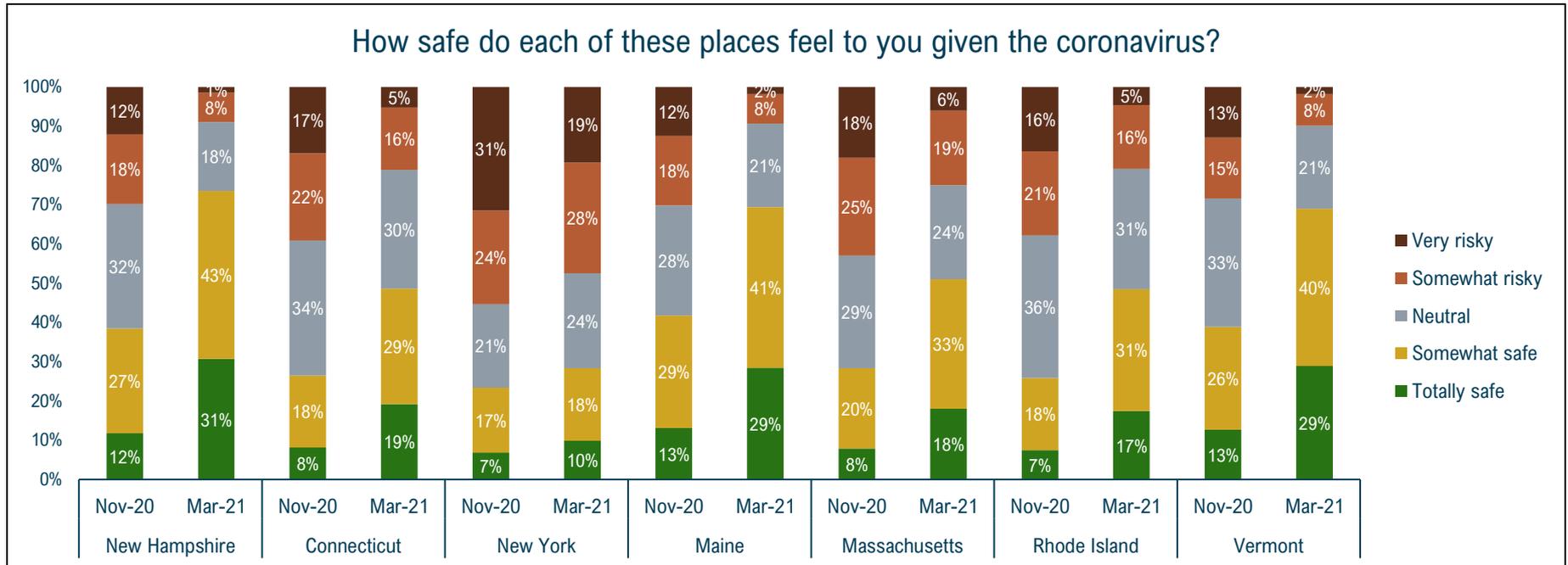
Travel Readiness & Comfort Level



- Compared to November 2020 (our previous New Hampshire research), consumers are much more ready to travel and are much more comfortable in leisure travel situations.
- Vaccine distribution, case declines, and warmer weather are improving travel sentiment.

Competitive Set Safety Perception

How safe do each of these places feel to you given the coronavirus?



- Perceived safety of New Hampshire and competitors has improved since November 2020.
- And New Hampshire is now perceived to be the safest of any state to visit.



Appendix: Questionnaire

Questionnaire

**New Hampshire Tourism
Winter & InState Ad Awareness and ROI
March 2021**

ZIP. What is your ZIP code? _____

S1. Please indicate if each of the following apply to you.

ROTATE	Yes	No
I regularly use social media like Facebook, Twitter or Instagram	<input type="checkbox"/>	<input type="checkbox"/>
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home (IF =0, TERMINATE AFTER SCREENING QUESTIONS)	<input type="checkbox"/>	<input type="checkbox"/>
I regularly engage in some form of physical exercise like walking, biking or participating in sports to help stay healthy	<input type="checkbox"/>	<input type="checkbox"/>
I use video streaming services like Hulu or Netflix	<input type="checkbox"/>	<input type="checkbox"/>
I'm interested in taking winter vacations that involve skiing, snowboarding, snowmobiling, snowshoeing, or other outdoor winter activities (IF =0, TERMINATE AFTER SCREENING QUESTIONS. DO NOT TERMINATE IN-STATE RESPONDENTS HERE)	<input type="checkbox"/>	<input type="checkbox"/>
I like to travel during the fall to view the changing leaves	<input type="checkbox"/>	<input type="checkbox"/>

S2. Who in your household is primarily responsible for making decisions concerning travel destinations?

1. Me
2. Me and my spouse/partner
3. My spouse/partner → TERMINATE
4. Someone else → TERMINATE

AGE. What is your age? _____ [TERMINATE under 18 - over 65]

Social. Which of the following social networking sites do you use? *Select all that apply.* [ROTATE]

- Facebook
- Twitter
- YouTube
- Instagram
- Travel review sites such as TripAdvisor
- Snapchat
- Pinterest
- Other, please specify _____
- None

1. Thinking about places to go for leisure trips, what U.S. STATES come to mind as good places to go? (USE DROP DOWN LISTS)

- STATE #1 _____
- STATE #2 _____
- STATE #3 _____
- STATE #4 _____
- STATE #5 _____

2. How familiar are you with each of the following states, in terms of what it has to offer as a place for a leisure trip or vacation?

[ROTATE]	Not at all familiar	Not very familiar	Somewhat familiar	Very familiar
New Hampshire				
Connecticut				
New York				
Maine				
Massachusetts				
Rhode Island				
Vermont				

3. How likely are you to take a leisure trip to or within the following states in the next year?

[ROTATE]	Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip
New Hampshire					
Connecticut					
New York					
Maine					
Massachusetts					
Rhode Island					
Vermont					

Q3A, Q3B, AND Q3C ARE FOR IN-STATE ONLY

3a. Which of the following have you done in New Hampshire in 2021?

ROTATE, ANCHOR "NONE"	
Explored new parts of the state	
Ordered takeout from a local restaurant	
Dined in at a local restaurant	
Tipped a server a little more than usual	
Shopped at a local store	
Stayed at a local inn, B&B, or resort	
Supported a small New Hampshire business	
Bought a gift card to a local restaurant	
None of these	

Questionnaire

3b. How likely are you to do the following in New Hampshire during the rest of 2021?

[ROTATE]	Not at all likely	Not very likely	Somewhat likely	Very likely	Will definitely do
Explore new parts of the state					
Order takeout from a local restaurant					
Dine in at a local restaurant					
Tip a server a little more than usual					
Shop at a local store					
Stay at a local inn, B&B, or resort					
Support a small New Hampshire business					
Buy a gift card to a local restaurant					

ASK Q3C IF THEY HAVE DONE ANYTHING FROM Q3A

3c. You indicated that you have done these things in New Hampshire in 2021. Approximately how much have you spent doing each?

SHOW THOSE THAT THEY HAVE DONE FROM Q3QA. NOTE THE TENSE CHANGE.	
Exploring new parts of the state	
Ordering takeout from a local restaurant	
Dining in at a local restaurant	
Tipping a server a little more than usual	
Shopping at a local store	
Staying at a local inn, B&B, or resort	
Supporting a small New Hampshire business	
Buying a gift card to a local restaurant	
Total	SHOW TOTAL

4. Which of the following states would you prefer to visit for a leisure trip within the next year?
Please select only one. [ROTATE]

New Hampshire	
Connecticut	
New York	
Maine	

Massachusetts	
Rhode Island	
Vermont	
Other, please specify	

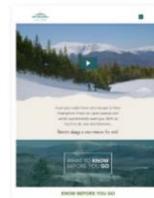
5. Have you taken a leisure trip to or within any of the following states in 2021? How many trips did you take in 2021?

[ROTATE]	States traveled to or within in 2021 (Select all that apply)	Number of trips in 2021 FORCE GREATER THAN 0
New Hampshire		
Connecticut		
New York		
Maine		
Massachusetts		
Rhode Island		
Vermont		
None of these		

6. In the course of planning for any recent or upcoming trips to or within New Hampshire, have you gathered information in any of the following ways?

1. Requested a New Hampshire Visitor's Guide
2. Visited the New Hampshire Tourism site, www.visitnh.gov
3. Visited the Visit New Hampshire Facebook page
4. Followed Visit New Hampshire on Twitter
5. Followed Visit New Hampshire on Instagram
6. Received an e-newsletter
7. Requested information about a New Hampshire trip in another way
8. None of these

I:\Ads Master\New Hampshire\2021\Assets for Winter 2021 Survey\Website



Visit NH Homepage Layout Winter 2021_Page_1



Visit NH Homepage Layout Winter 2021_Page_2



Visit NH Homepage Layout Winter 2021_Page_3

Questionnaire

INSTATE ONLY

I:\Ads Master\New Hampshire\2021\In-State_Winter 2021 Support Local Campaign Assets\Website Landing Page



Support Local 603 Landing Page

FOR IN-STATE ASK Q7 FOR THE REGULAR WEBSITE AND THE SUPPORT LOCAL LANDING PAGE.

Q7. Have you visited this New Hampshire website before?

- 1. Yes
- 0. No

I:\Ads Master\New Hampshire\2021\Assets for Winter 2021 Survey\FB Homepage



Winter 2021 Facebook Homepage

Q7a. Have you visited the New Hampshire Facebook page before?

- 1. Yes
- 0. No

I:\Ads Master\New Hampshire\2021\Assets for Winter 2021 Survey>Email



Visit NH Winter 2021 Newsletter

I:\Ads Master\New Hampshire\2021\In-State_Winter 2021 Support Local Campaign Assets\Yankee Newsletters



Great North Woods Retail



Lakes Region Lodging



Monadnock Dining



Monadnock Lodging



Seacoast Retail



Support Local

Q7b.

WORDING FOR VISIT NH NEWSLETTER: Have you received this New Hampshire e-newsletter?

WORDING FOR YANKEE NEWSLETTER: Have you received this e-newsletter from Yankee?

- 1. Yes
- 0. No

8. Please consider the following descriptions that could be used to describe travel destinations, and indicate how much you agree each statement describes New Hampshire.

Questionnaire

HAVE THEM RATE NEW HAMPSHIRE IF AT LEAST SOMEWHAT FAMILIAR AT Q2

[ROTATE]	Strongly disagree	2	3	4	Strongly agree
Is a fun and exciting place					
Always has something new to discover					
Is a good place to live and work					
Is beautiful					
Offers an attractive lifestyle					
Is rich in culture and the arts					
Is a good place for culinary activities, including U-pick farms and beer/wine trails					
Has great parks					
Offers lots of outdoor recreation					
Is safe					
Is a kid-friendly vacation destination					
Is easy to get to					
Is unique because of the variety of destinations and activities it offers vacationers					
Has interesting historical sites and museums					
Is a great place for winter sports such as skiing and snowmobiling					
Is a place I would be excited to visit for a leisure trip					
Is a good place for shopping					
Is a great place to vacation when traveling with children					
Offers great vacations for people like me					
Is affordable					
Is a good place for fairs and festivals					
Is a good place to go to the beach					
Is a good place for water activities					

(IF Q5 IS NOT NEW HAMPSHIRE SKIP TO AD SECTION)

Now please give us some information about the trip(s) you took to or within New Hampshire in 2021.

9. When did you travel to or within New Hampshire for a leisure trip? (ACCEPT MULTIPLES)

- January 2021
- February 2021
- March 2021
- April 2021

Now we'd like to ask you some questions about your most recent New Hampshire trip.

10_1. How many nights did you spend in New Hampshire during this trip? _____

10_2. Including you, how many people were in your travel party? _____

ASK Q10b if Q10_2 >1

10b. Of those, how many were children under age 18? _____

ASK Q10c if Q10_1 >0

10c. What forms of lodging did you use during your trip? *Select all that apply.*

- Luxury resort hotel
- High-end full-service hotel
- Mid-level hotel
- Budget hotel or motel
- Bed and breakfast/Inn
- Airbnb
- Camping/RVing
- Home of family or friends
- Vacation home
- Other

11. Which of the following activities did you participate in during your trip to or within New Hampshire?

Select all that apply. [ROTATE]

Hiking or backpacking	Wildlife watching	
Visiting a state or national park	Bird watching	
Bicycling or mountain biking	Scenic drive	
ATVing	Sightseeing tour	
Rock climbing	Golfing	
	Shopping at locally owned stores	
Hunting	Dining at locally owned restaurants	
Camping	Visiting a noteworthy bar or nightclub	
Snow skiing or snowboarding	Farm to table dinner	
Snowmobiling	Winery tours	
	Brewery	
Visiting museums		
Attending a play or concert		
Attending performing arts (music/theater)	Dogsledding	
Visiting historical sites	Cross country skiing	
Snowshoeing	Ice fishing	
Ice skating	Other, please specify _____	
	None of these	

ONLY SHOW THE ACTIVITIES THEY CHOSE ABOVE PLUS NONE AND ASK:

12. Of these activities, please indicate if there were any that were a major influence when you selected the destination for this trip to New Hampshire. *You may choose up to 3.*

INSERT NEW HAMPSHIRE REGIONS MAP

13. Which of the following regions did you visit during your trip?

Questionnaire

14. Thinking about your overall travel experience in New Hampshire on your most recent trip, would you say it was...?

5. Excellent
4. Very good
3. Good
2. Fair
1. Poor

15. When you think of your most recent trip to New Hampshire, what thoughts, feelings or emotions come to mind? _____

16. To better understand your travel habits, we are interested in finding out the approximate amount of money you and other members of your travel party spent while in New Hampshire on your most recent trip. Please estimate how much your travel party spent in total on...

Please complete all fields – best estimate is fine. If no expenditures in a category enter a "0"

- Accommodations (includes campground fees) _____
- Food and beverage service _____
- Food stores _____
- Retail sales _____
- Arts, entertainment, and recreation _____
- Local transportation & gasoline _____
- Air transportation while in the state _____
- Other _____

17. Thinking about this trip, how far in advance did you begin to plan?

- 1...Less than 1 week
- 2...1 to 2 weeks
- 3...2 to 3 weeks
- 4...3 to 4 weeks
- 5...1 to 2 months
- 6...3 to 4 months
- 7...More than 4 months in advance
- 8...Don't know

18. Did you post any information about this trip on the following outlets? *Select all that apply.*

1. Facebook
2. Twitter
3. Flickr
4. YouTube
5. Blogs
6. Instagram
7. Pinterest
8. Snapchat
9. None of these

18a. Did you visit or participate in any of the following on your trip?

ROTATE, ANCHOR "NONE"	
Retreat and rendezvous centers	
Nature centers	
Farm tours	
Farm-based lodging	
Cross-country ski or snowshoe trails	
Country overnight bed and breakfast	
Bird or big-game hunting preserves	
Bird and wildlife watching	
Corn mazes or haunted forests	
Petting farms	
Hands-on U-pick	
Winery/vineyard	
Horse-back, hay, sleigh, vintage tractor, snow-machine or sled-dog rides	
Farmers markets	
Rural wedding	
None of these	

18b. Please estimate how much your travel party spent at...

SHOW THOSE THAT THEY DID FROM Q18A	
Retreat and rendezvous centers	
Nature centers	
Farm tours	
Farm-based lodging	
Cross-country ski or snowshoe trails	
Country overnight bed and breakfast	
Bird or big-game hunting preserves	
Bird and wildlife watching	
Corn mazes or haunted forests	
Petting farms	
Hands-on U-pick	
Winery/vineyard	
Horse-back, hay, sleigh, vintage tractor, snow-machine or sled-dog rides	
Farmers markets	
Rural wedding	
None of these	

23. How likely are you to recommend a trip to New Hampshire?

1. Very likely
2. Somewhat likely
3. Not likely

Questionnaire

24. Have you seen any advertising for New Hampshire as a travel destination?

1. Yes
0. No

Next you will be shown some travel advertisements. Please take a moment to view the ads and answer the questions.

IN-STATE RESPONDENTS GET ALL ADS. OUT OF STATE RESPONDENTS GET ONLY THE NON-IN-STATE ADS.

PRINT

I:\Ads Master\New Hampshire\2021\Assets for Winter 2021 Survey\Print Ad



Print Ad_

DTTD5761-20_winteryankeecoop_15_5x10_5_bleed

WinterPrint. Please indicate if you have seen this print ad before.

1. Yes
0. No

WinterPrintB. What is your reaction to this ad?

1. Positive
2. Neutral
3. Negative – ASK WinterPrintC

WinterPrintC. Why do you feel that way? _____

DIGITAL

I:\Ads Master\New Hampshire\2021\Assets for Winter 2021 Survey\Display Ads



VisitWinterFY21_Mixed Activities_300x250_backup



VisitWinterFY21_Mobile_320x50



VisitWinterFY21_Skiing_300x250_backup

WinterDigital. Please indicate if you have seen each of these online ads before.

1. Yes
0. No

WinterDigitalB. What is your reaction to these ads?

1. Positive
2. Neutral
3. Negative – ASK WinterDigitalC

WinterDigitalC. Why do you feel that way? _____

Questionnaire

INSTATE ONLY

I:\Ads Master\New Hampshire\2021\In-State_Winter 2021 Support Local Campaign Assets\Display Ads\Use



DTTD_Yankee_NativeTile



GoTheExtraMileFY21_Support Local_300x250

WinterDigital1. Please indicate if you have seen each of these online ads before.

1. Yes
0. No

WinterDigitalB1. What is your reaction to these ads?

4. Positive
5. Neutral
6. Negative – ASK WinterDigitalC

WinterDigitalC1. Why do you feel that way? _____

VIDEO

I:\Ads Master\New Hampshire\2020\Winter Awareness\Visit NH Winter 2020\TV Spot



NH TOURISM 30 - COMBO - DI...

NH TOURISM 30 - COMBO - DISCOVER YOUR NEW 3.mp4

<https://vimeo.com/520421628>

WinterTVA. Where do you recall seeing the ad? *Select all that apply.*

1. On TV
2. Online
3. Don't recall

PRE-ROLL ASK OF EVERYONE

I:\Ads Master\New Hampshire\2020\Winter Awareness\Visit NH Winter 2020\Pre-roll digital videos All 15 secs:

10_SNOWMOBILE_Video Dark Post.mp4	11_Shopping_Video Dark Post.mp4	13_Snowshoe_Video Dark Post.mp4
https://vimeo.com/520419157	https://vimeo.com/520419934	https://vimeo.com/520421078

WinterTV. How many times have you seen this or a similar ad for New Hampshire?

- More than three times
- Two or three times
- Once
- Never

WinterTVB. What is your reaction to this ad?

1. Positive
2. Neutral
3. Negative – ASK WinterTVC

WinterTVC. Why do you feel that way? _____

Questionnaire

INSTATE ONLY



Go the Extra Mile - Final- Resiz...

<https://vimeo.com/520930178>



WMUR Sponsorship Support L...

WMUR Sponsorship Support Local-Hometown Weather BB-trimmed.mp4

<https://vimeo.com/520974834>

WinterTV1. How many times have you seen this or a similar ad for New Hampshire?

- More than three times
- Two or three times
- Once
- Never

WinterTVB1. What is your reaction to this ad?

- 4. Positive
- 5. Neutral
- 6. Negative – ASK WinterTVC

WinterTVC1. Why do you feel that way? _____

OUT OF HOME

F:\Ads Master\New Hampshire\2021\Assets for Winter 2021 Survey\Billboards\USE



Billboard_MA_CT_RI_Ski



Billboard_MA_CT_RI_Snowmobile



Billboard_MA_CT_RI_Snowshoe

WinterOOHA. Please indicate if you have seen each of these outdoor ads before.

- 1. Yes
- 0. No

WinterOOHB. What is your reaction to these ads?

- 1. Positive
- 2. Neutral
- 3. Negative – ASK WinterOOHC

WinterOOHC. Why do you feel that way? _____

INSTATE ONLY

I:\Ads Master\New Hampshire\2021\In-State_Winter 2021 Support Local Campaign Assets\Billboard



DTTD_GTEM_Digital Bulletin_9x22

WinterOOHA1. Please indicate if you have seen each of these outdoor ads before.

- 1. Yes
- 0. No

WinterOOHB1. What is your reaction to these ads?

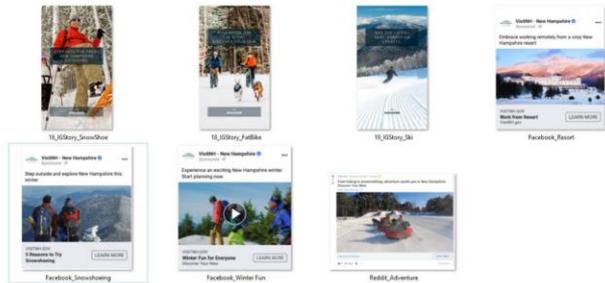
- 4. Positive
- 5. Neutral
- 6. Negative – ASK WinterOOHC

WinterOOHC1. Why do you feel that way? _____

Questionnaire

SOCIAL

I:\Ads Master\New Hampshire\2021\Assets for Winter 2021 Survey\Social Ads



WinterSocial. Please indicate if you have seen each of these social media ads before.

- 1. Yes
- 0. No

WinterSocialB. What is your reaction to these ads?

- 1. Positive
- 2. Neutral
- 3. Negative – ASK WinterSocialC

WinterSocialC. Why do you feel that way? _____

INSTATE ONLY

I:\Ads Master\New Hampshire\2021\In-State_Winter 2021 Support Local Campaign Assets\Social Ads



WinterSocial1. Please indicate if you have seen each of these social media ads before.

- 1. Yes
- 0. No

WinterSocialB1. What is your reaction to these ads?

- 4. Positive
- 5. Neutral
- 6. Negative – ASK WinterSocialC

WinterSocialC1. Why do you feel that way? _____

28. Given all of these ads together, how much do you think this campaign shows a place...? **ROTATE**

	Strongly disagree				Strongly agree
Where I would be inspired and invigorated	1	2	3	4	5
Where I could reconnect with my family	1	2	3	4	5
Where I would feel free-spirited	1	2	3	4	5
Where I would be challenged to live life to the fullest	1	2	3	4	5
Where I could uncover new places or things	1	2	3	4	5

29. How much does this campaign make you...?. **ROTATE**

Want to learn more about things to see and do in the state	1	2	3	4	5
Want to go to the state website or request a brochure from the state	1	2	3	4	5
Want to visit the state	1	2	3	4	5

Questionnaire

CORONAVIRUS QUESTIONS SECTION

The following questions are about your thoughts and behaviors given the coronavirus/COVID-19 pandemic.

C1. Which of the following best describes how you feel about traveling soon?

I would not even consider traveling any time soon	
I will wait and see what happens in the coming weeks before planning any trips	
I am ready to start planning a trip now	
I already have plans to travel soon	

C2. Currently, how comfortable are you ...?

[ROTATE]	Not comfortable	Somewhat comfortable	Completely comfortable
Staying in the home of a friend or family member			
Staying in a homeshare like Airbnb or VRBO			
Staying in a hotel			
Attending a large outdoor event			
Attending a large indoor event			
Taking public transportation			
Visiting large cities			
Visiting small towns			

C3. How much do you agree with the following statements?

[ROTATE]	Disagree strongly	Disagree somewhat	Neither agree nor disagree	Agree somewhat	Agree strongly
I am now more likely to take a road trip than I was before the coronavirus					
Ads for vacation destinations should not be shown during times of emergency like the coronavirus					
It is irresponsible to travel right now					
I am optimistic regular travel will resume soon					
I feel like I need to get away now more than ever					

C4. How safe do each of these places feel to you given the coronavirus?

[ROTATE]	Very risky	Somewhat risky	Uncertain	Somewhat safe	Totally safe
New Hampshire					
Connecticut					
New York					
Maine					
Massachusetts					
Rhode Island					
Vermont					

The following questions are for classification purposes only and will help us understand different groups of people.

DEMOS

The following questions are for classification purposes only so that your responses may be grouped with those of others.

D3. Are you currently ...?

- Married
- Divorced
- Widowed
- Single/Never married

D4. Including you, how many people live in your household? _____ [IF 1, SKIP TO D6]

D5. How many children under the age of 18 live in your household? _____

D6. Which of the following categories represents the last grade of school you completed?

- High school or less
- Some college/technical school
- College graduate
- Post-graduate degree

D7. Which of the following categories best represents your total annual household income before taxes?

- Less than \$35,000
- \$35,000 but less than \$50,000
- \$50,000 but less than \$75,000
- \$75,000 but less than \$100,000
- \$100,000 but less than \$150,000
- \$150,000 but less than \$200,000
- \$200,000 or more

Questionnaire

D8. Which of the following best describes your racial and ethnic heritage? Are you...?

Select all that apply.

- African-American/black
- Asian/Pacific Islander
- Caucasian/white
- Latino/Hispanic
- Mixed ethnicity
- American Indian
- Other, please specify _____)

D9. Are you ...?

- Male
- Female